Regional NIAGARA

Tourism.....
In The Niagara Region

Report No.4

1982 and 1983 Tourism Seasons

Planning and Development Department

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1982 and 1983 Tourism Seasons

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Memo to: Planning and Development Committee

From: Planning Staff

Re: 1982 and 1983 Tourism Seasons

Introduction

This final background report in the "Tourism In the Niagara Region" series provides an update on information provided earlier in the series. Four recent surveys have been reviewed and their major conclusions are presented here. These four new sources are:

- Ontario Tourism Statistical Handbook (1983)
- Tourist Information Booth Questionnaire (1983)
- French Speaking Tourist Surveys (1982 and 1983)
- Conservation Area Visitor Survey (1983)

In presenting the findings, a general observation should be made that there are serious problems in comparing among the above reports, and in comparing these reports with earlier studies. Changing definitions, changing geographical areas, different information and questions in different surveys, and different groups being asked the questions, all provide problems in interpretation. Nevertheless, the major conclusions that can reasonably be drawn from the above studies are presented below and, as far as possible, are integrated to provide a recent tourism picture for Niagara.

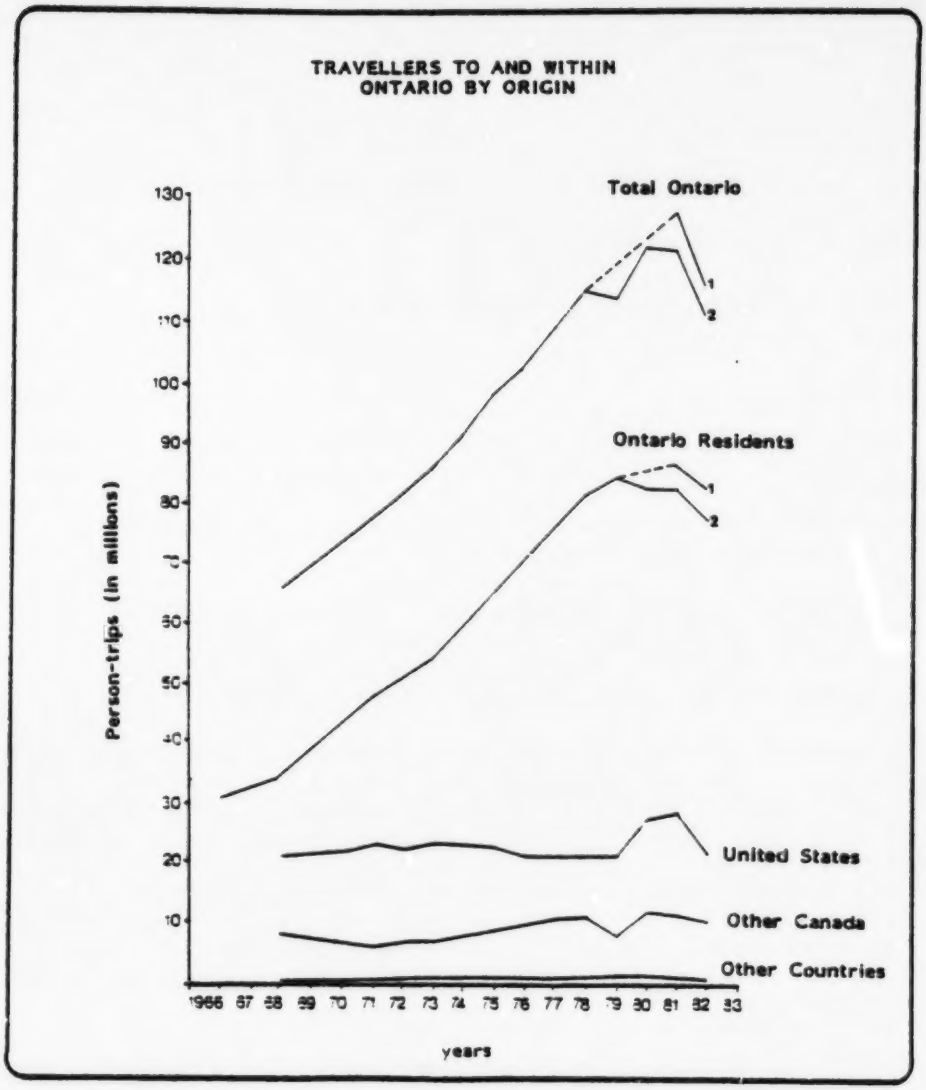
The major points are presented under the headings noted in the Table of Contents.

Travellers In Ontario

The total number of travellers in Ontario over the last fifteen years is shown in Figure 1, from which the following conclusions can be drawn.

- The total number of travellers in Ontario rose sharply during the 1970's, although there was some reduction in the numbers in 1982.

FIGURE 1



Travellers consist of residents of Ontario (and other Canadian Provinces) who travel, for any purpose, to destinations 25 miles or more (one-way) away from home. Daily travel from home to work is excluded, along with commercial truck operators and inter-city public transport operators. The recent data shown on the number of Canadian travellers consist of (1) Provincial estimates of the number of Ontario Resident travellers in 1981 and 1982 (based on a revised method that would likely yield high estimates); as well as, (2) our estimates of the number of Ontario Resident travellers and visitors from Other Provinces for 1979 to 1982 (based on the rate of increase in the annual number of trips 50 miles or more in length).

Residents of the United States (and other countries) who travel to Canada are included provided they visit for a period of less than 12 months, and clear Canada Customs and Immigration, and have Ontario as the main destination. For the years 1968 to 1971 the data included transport operators but this represents a relatively small number and does not warrant an estimated correction.

Bibliography Items: 4, 5, 7, 12, 13, 14, 15 and 16.

- The main cause of the above trend was the substantial increase in the number of Ontario resident travellers. The recent decline in the number of Ontario resident travellers is presumably due to economic conditions.

- The volume of United States travellers has changed very little during the last 15 years except for an abnormality in 1980 and 1981 which is thought to be mainly due to U.S. residents coming over for gas.

- In summary the recent picture represents somewhat of a downturn in tourism volumes in Ontario.

Travellers to Niagara-Iroquoia[1]

The total number of travellers to the Niagara-Iroquoia Tourist Area represents a somewhat different situation to that for Ontario. Our estimates, which are based on the 1982 number of travellers to Ontario and the 1976 destination of travellers, are shown in Figure 2. The main points from that figure are:

- A substantial downturn occurred in the number of travellers to Niagara-Iroquoia during the mid 1970's. However, an estimate for 1982 suggests a substantial return almost to previous levels.

- Ontario resident travellers and U.S. visitors represent almost all the travellers.

- The proportion of travellers in Niagara-Iroquoia who are Ontario residents remains somewhat smaller than the proportion who are U.S. visitors.

Other data, as shown in Table 1, indicate that the overall tourist volumes in Niagara probably increased by between 4% and 10% between 1976 and 1982.

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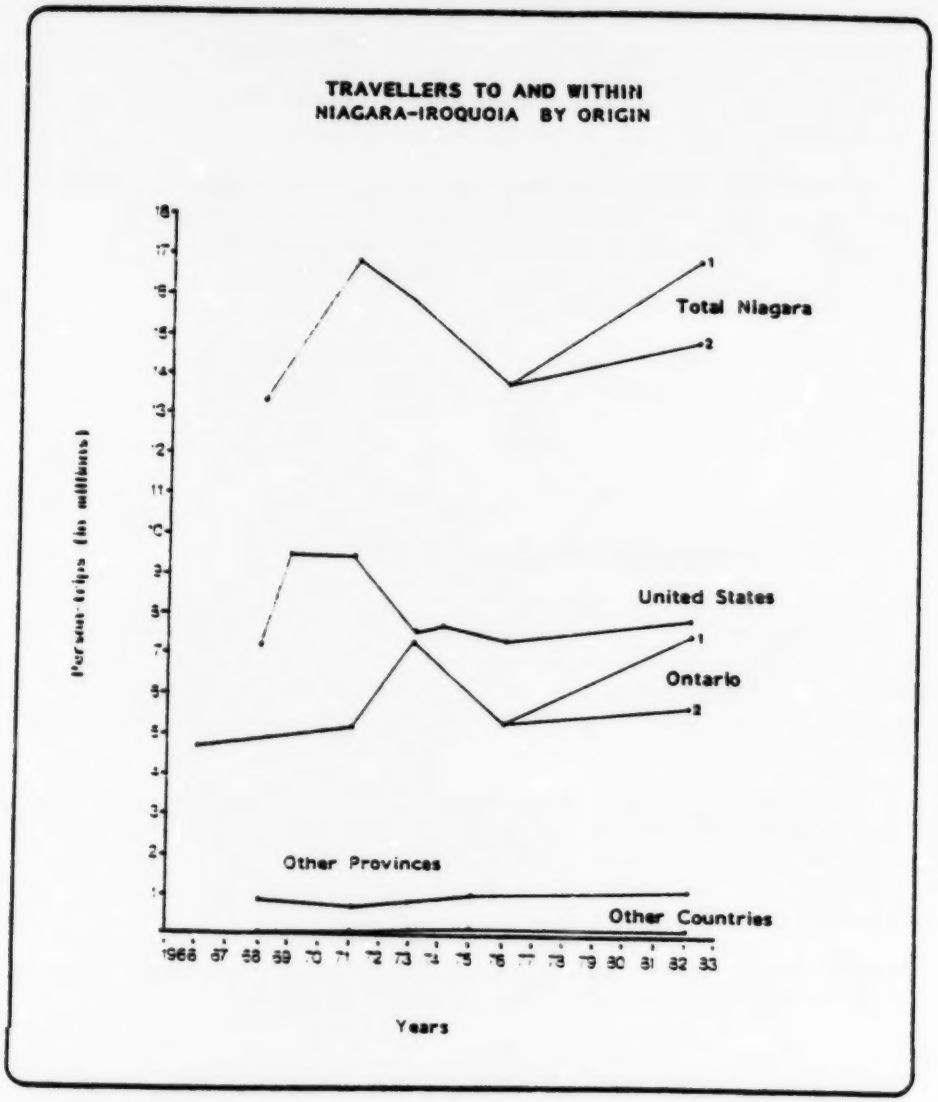
[1]The Niagara-Iroquoia Tourist Area includes the Regions of Niagara and Hamilton-Wentworth, the Counties of Brant and Haldimand, and the City of Burlington.

FIGURE 2



[1]This estimate of the 1982 number of travellers has been based on the 1982 number of Ontario resident travellers with Festival Country or South-western Ontario as the destination and the proportion of these travellers destined to Niagara-Iroquoia as reported for 1976.

[2]This estimate of the 1982 number of travellers has been based on the 1982 number of Ontario resident travellers with a destination in Ontario and the proportion of these travellers destined to Niagara-Iroquoia as reported for 1976.

Bibliography Items 7, 9, 11, and 12.

TABLE 1

Growth in Niagara's Tourist Volumes

	1976-1982
Niagara Parks attractions attendance	4.5%
Niagara Parkway traffic count	3.6%
Queen Victoria Parks traffic count	4.8%
Hotel and Motel Occupancy Rates change	10.1%*

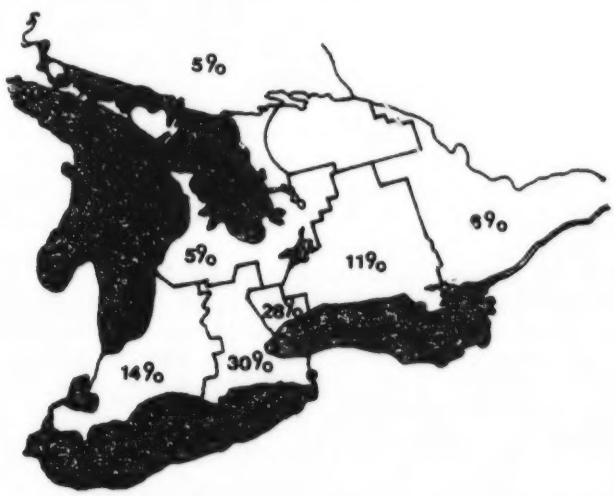
* If there was an increase in the number of available units, the above figure would represent a low estimate of the increased tourist volumes.

Source: Bibliography Items 1 and 10.

The source of visitors from Ontario to Niagara is shown in Figure 3.

FIGURE 3

Origin of Ontario Resident Travellers to Niagara (1982)



Source: Bibliography Item 11.

In comparing the above pattern with earlier years, the most obvious change appeared to be a decline in the proportion of visitors coming from South Western Ontario. The importance of the market within a one day's drive is clearly shown in the above pattern.

Market Forecasts

The number of visitors to Niagara depends upon the size of the population within convenient travelling distance as well as successful marketing. Recent Provincial forecasts suggest a 7 percent increase in the population of Ontario during the 1980's in contrast to the previous forecast of 10 percent.

Forecasts made for New York and the Great Lakes States indicate a slight decrease in future population.

Who Comes to Niagara?

The Tourist Information Booth Questionnaire conducted by the Regional Planning and Development Department as part of the Tourism report series, suggests that 28 percent of the visitors are children or teenagers, and that 42 percent of the visiting parties are families. Furthermore, both the Questionnaire and other studies indicate that about 60 percent of the adults are 44 years of age or less and 7-8 percent are 65 years of age or more.

Based on the Tourist Information Booth Questionnaire, the average tourist party size in Niagara is 3.4, and the most common size is 2 persons (39% of the parties). These data also indicate that there is little difference in the average party size of Canadian and U.S. tourists.

The distribution of party sizes shows that somewhat less than half of the visiting parties are 3 to 4 people (46 percent) and about half of the parties are 1 and 2 people or 6 and more (54 percent). Relatively small proportions of the parties are 1 person (5 percent) or 6 and more (10 percent).

Two recent surveys on French speaking tourists in Niagara have been undertaken by the Bienvenue a Niagara organization and the Region Niagara Tourist Council. These surveys suggest that Francophone visitors have larger party sizes (3.66 persons) and that a higher proportion of parties are families (58%) but it appears that the proportion of visitors which are children is about the same as above (28%).

With respect to the origin of U.S. visitors to Niagara, the results of our Tourist Information Booth Questionnaire (Table 2) suggest that a lower proportion of U.S. visitors are from New York State (30 percent) than other surveys indicate. This is expected since New York State residents are more likely to be familiar with Niagara and thus less likely to visit a tourist information booth. However, the questionnaire results confirm the relative importance of the North-East and Great Lakes States (82 percent of all U.S. visitors).

TABLE 2

Origin of United States Visitors to Niagara

New York State	Great Lake* States	North** Eastern & Great Lake States	Other States
30%	77%	82%	18%

* Great Lakes States includes New York, New Jersey, Pennsylvania, Ohio, Wisconsin, Michigan, Illinois, Indiana.

**North Eastern and Great Lakes States includes the Great Lakes States plus Maine, Vermont, New Hampshire, Massachusetts, Rhode Island, Connecticut.

Source: Regional Niagara Planning and Development Department, 1983 Tourist Information Booth Survey.

How Long Do Visitors Stay In Niagara?

In terms of length of stay, the picture is shown in Table 3.

TABLE 3

Length of Stay

	Origin	Date	Proportion of Trips Day Only	Average Length of Stay In) Nights)	Average Length of Stay If One Or More Nights
Visitors to Ontario	Ontario	1982	65%	1.0	2.7
	U.S.	1982	77%	not available	
Visitors to Festival Country	Ontario	1982	76%	0.5	2.1
	U.S.	1982		not available	

Source: Ontario Tourism Statistical Handbook (1983)

The following conclusions appear from the above table:

- For Ontario visitors, the average length of stay in Festival Country* is about 0.5 nights which is half the Provincial average, due of course to the high proportion of day trips to this area.

- If people stay overnight, it appears that they tend to stay more than two nights.

The results of the 1983 Tourist Information Booths Questionnaire, as shown in Table 4, indicate a considerably higher proportion of overnight stays in Niagara as compared to data shown in Table 3. The most likely explanation for this difference is that the travellers who visit tourist information booths tend to be first time visitors and are from further away, and therefore would likely stay longer than overnight.

TABLE 4

Length of Stay in Niagara
(1983 Tourist Information Booth Questionnaire)

	Day Only	1 to 6 Nights	More Than 6 Nights	Unknown
Ontario Residents	37%	55%	5	4
U.S. Visitors	26%	60	12	2
All Travellers	28%	60	10	2

Finally, with respect to Francophone visitors, the previously mentioned Francophone surveys indicate that at least 86 percent of these visitors stay more than one day, which indicates a longer length of stay than for the typical visitor.

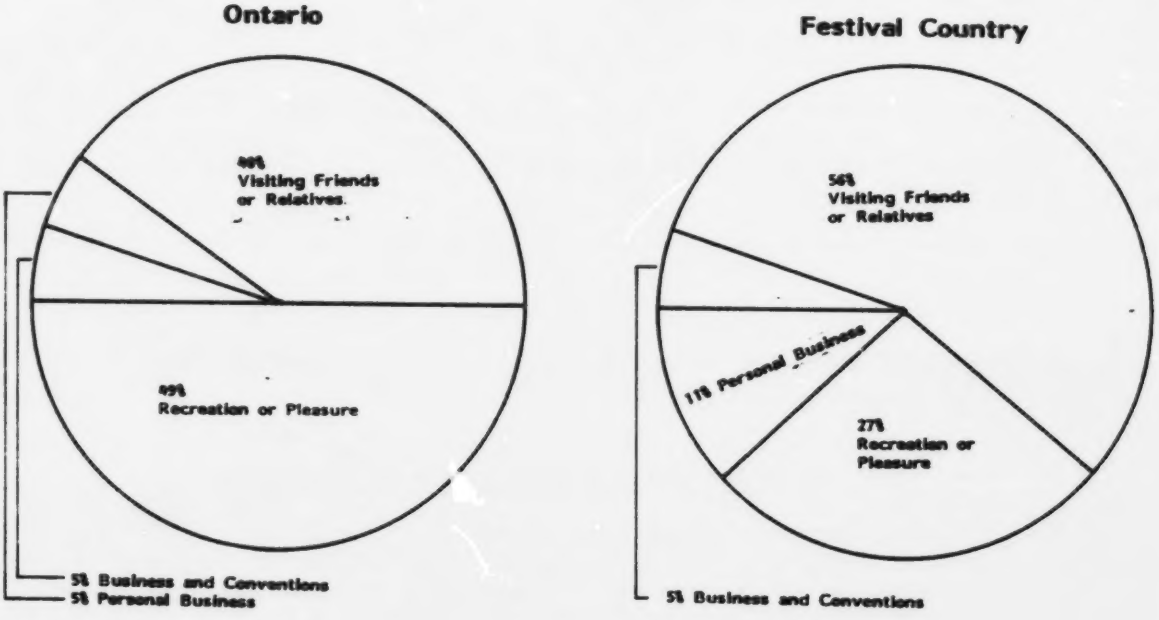
*Festival Country (which includes the Niagara-Iroquoia Tourist Area) consists of the Region of Niagara, Hamilton-Wentworth, Haldimand-Norfolk, Halton, and Waterloo, and the Counties of Brant, Wellington, and Dufferin.

Why Do People Visit Niagara?

There are two sources of information as to why people visit Niagara. The first source - the Provincial survey for 1982-indicates that the main reason for travelling in Ontario by Ontario residents is to visit friends or relatives; however, for Festival Country, this reason is even more important (Figure 4). This is not a surprising result since Festival Country does not represent the frequented weekly cottage resort areas such as Muskoka and Georgian Bay.

FIGURE 4

Main Purpose of Ontario Resident Trips by Destination, 1982
(in Person - Nights Away)



Source: Bibliography Item 11.

The second source, the 1983 Tourist Information Booth Questionnaire for the Niagara Region, indicated, as expected, that the Falls and Gorge were the predominant attractions. The results of that survey are as follows:

TABLE 5

Reasons For Visiting Niagara
(Proportions which indicated each reason)

Falls & Gorge	Entertainment and Amusement Centres	Countryside Touring	Welland Canals	Gardens	Historic Interests	Shopping	Outdoor Activities
62%	43%	43%	43%	39%	33%	33%	30%

Obtaining Fruit	Visiting Friends and Relatives	Park and/or Picnicking	Live Theatre	Business and Pleasure	Sports or Special Event
28%	21%	20%	12%	5%	4%

Source: Regional Niagara Planning and Development Department, 1983 Tourist Information Booth Survey.

How Much Do Travellers Spend, and on What?

In Ontario, expenditures per traveller increased 38.7 percent between 1976 and 1982; however, the index of travel prices increased by 88.6 percent suggesting an overall decrease in the consumption per traveller (Table 6). For Ontario resident travellers destined to Niagara-Southwest Ontario the data suggest a 22 percent increase in the dollar expenditures, which suggests a substantial decrease in the actual consumption per traveller.

Ontario resident travellers spend almost equal proportions of their travel dollar on food/beverages, retail/other miscellaneous items, public transportation, and service stations/automobile (respectively 23, 23, 21, and 20 percent) as shown in Figure 5. Relative to 1976, there has been a decrease in the proportion of expenditures on accommodation, and food/beverage.

TABLE 6

Expenditures Per Person-Trip (Current Dollar)

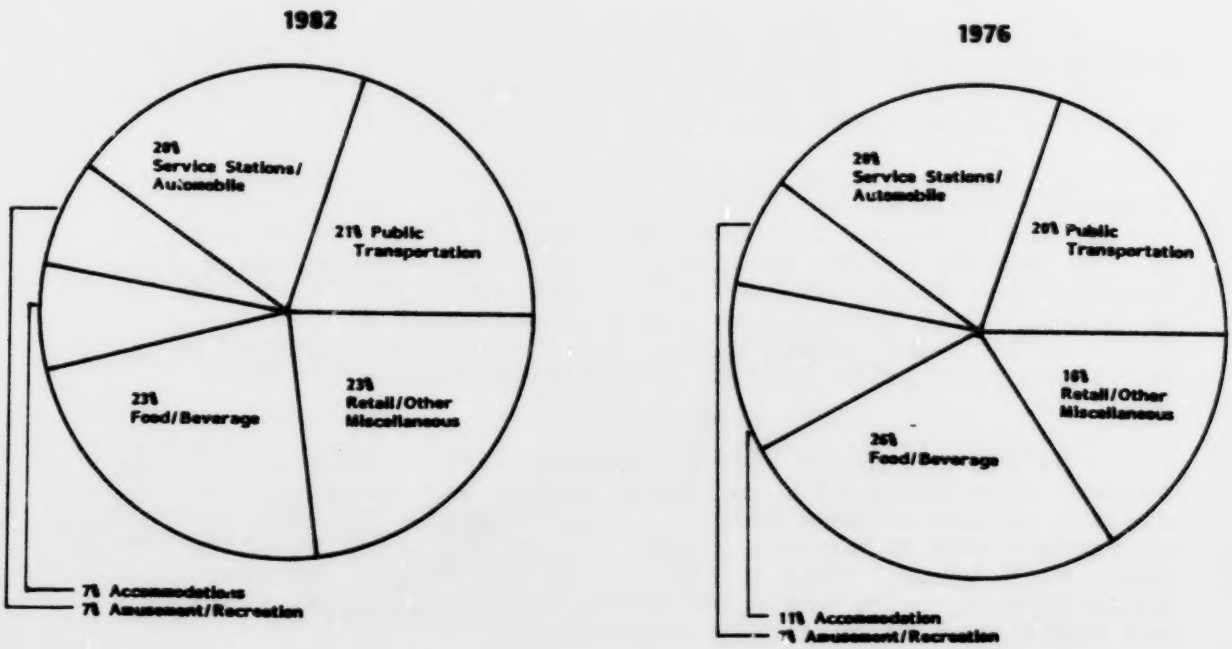
	1982				1976		
Destination	Ontario Resident Travellers	U.S. Visitors	Origins	Destination	Ontario Resident Travellers	U.S. Visitors	All Origins
Festival Country	$38.44	-	-	Niagara-Iroquoia	$41.68	$26.48	$36.60
Niagara-Southwest Ontario	$40.58	-	-	Niagara-Southwest Ontario	$33.26	$24.60	$32.49
Ontario	$49.49	$50.70	$58.52	Ontario	$40.47	$35.63	$42.18
Travel Price Index	298.00			Travel Price Index	158.00		

Travel Price Index attempts to measure the change in the price of those goods and services that most affect the cost of travelling (1971 = 100).

Source: Bibliography Items 7, 11 and 14 as well as Statistics Canada, Toronto Office.

FIGURE 5

Expenditures in Ontario by Ontario Resident Travellers



Source: Bibliography Items 7 and 11.

What Accommodation Do Travellers Use In Niagara-Iroquoia?

As shown in Table 7 and, as expected from the discussion of why visitors come here, staying with friends and relatives is the main source of accommodation.

TABLE 7

Accommodation Used In Niagara-Iroquoia
By Ontario Resident Travellers

	(Based on Person-Nights) 1982
Stay with Friends/Relatives	65%
Private Cottage	10
Camping/Trailer Park	12
Hotel/Motor Hotel	8
Motel	4
Resort Lodge	.5
Commercial Cottage Cabin	.3
Other	.1

Source: Ontario Travel Survey, 1983

The surveys of Francophone visitors suggest that the most frequented types of overnight accommodation were campgrounds (45 percent) and hotel/motels (42 percent), while staying with friends or family was less often used (13 percent).

In 1983, a survey of 4 Niagara Peninsula Conservation Authority Campgrounds - Chippawa Creek, Long Beach, Ball's Falls, and Binbrook indicated that almost half (46 percent) of the parties travel 10-30 miles away from home to visit a Conservation Authority Park and 42 percent travel more than 30 miles. This suggests that the Conservation Authority Parks assist, and likely encourage, the tourism industry by providing facilities used by substantial numbers of local visitors.

The typical party size is approximately 4 people with 29 percent consisting of 2 or fewer people and 12 percent consisting of six or more people. This suggests that the parties of campers are on average larger than the typical visiting party to Niagara. This should not be surprising, however, since camping trips would obviously exclude business trips and would tend to be family oriented.

Conclusions

The purpose of this report was to present some of the tourism information recently made available, and to update our previous reports on the Tourism In The Niagara Region series. In general some of the major finds in this report are:

- The number of Ontario resident travellers to Ontario has grown somewhat substantially during the 1970's while the number of U.S. visitors has remained about constant. The recent Provincial decline in tourism volumes appears largely due to the economic downturn,
- Based upon reasonable assumptions, it appears that the proportion of travellers in Niagara-Iroquoia who are Ontario residents remains somewhat smaller the proportion who are U.S. visitors,
- Expenditures made by travellers have not kept-up to the rate of inflation,
- Trips by Ontario resident travellers in Niagara are short - 77 percent of trips are day-trips and the average length of stay is 0.5 nights,
- Francophone tourists appear to have larger party sizes than average, a higher proportion of family parties, and a higher proportion than average who stay more than one day.

The above observations represent some of the most important aspects of tourism in Niagara, and should be considered as priority items in discussing "The Way Ahead" for Niagara's tourism industry.

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GN/RM/jm

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Tourism Industry

Ontario and Niagara

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